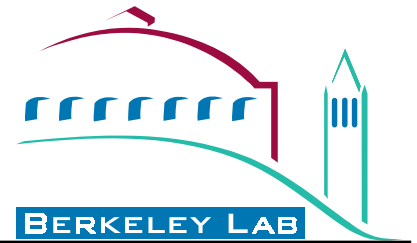
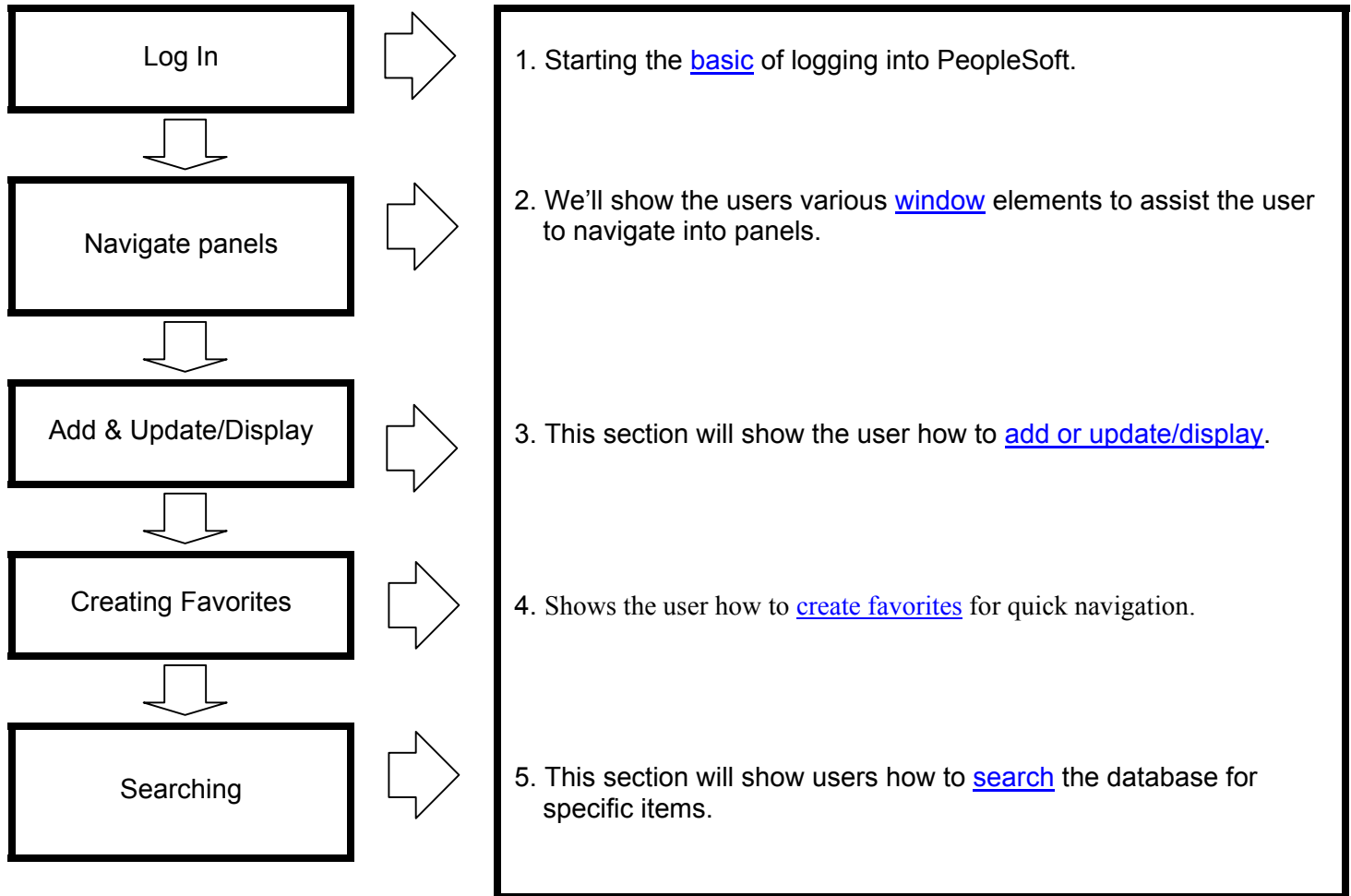


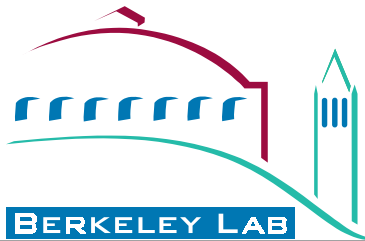
How do I work in PeopleSoft?



This training document will introduce the users to the basic PeopleSoft methodology. The users will be shown panel navigation, menu definitions, and panel descriptions. PeopleSoft is a Windows based application and users will need minimal Windows experience to work within the PeopleSoft Financial system.



How do I work in PeopleSoft?



Step 1: To Sign On and Off PeopleSoft

- ⇒ Start
- ⇒ FMS Production
- ⇒ FMS Production

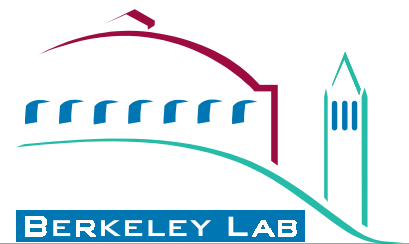
The PeopleSoft Signon dialog box displays.

Complete the following panel elements:

PANEL ELEMENT	DESCRIPTION	TRAINING EXAMPLE
Database Name	Name of the database; defaults	FMSPRD
Operator ID	Your specific operator identification code; defaults	Your operator ID will default based on IT specifications
Password	Your security password; case sensitive	Type your password

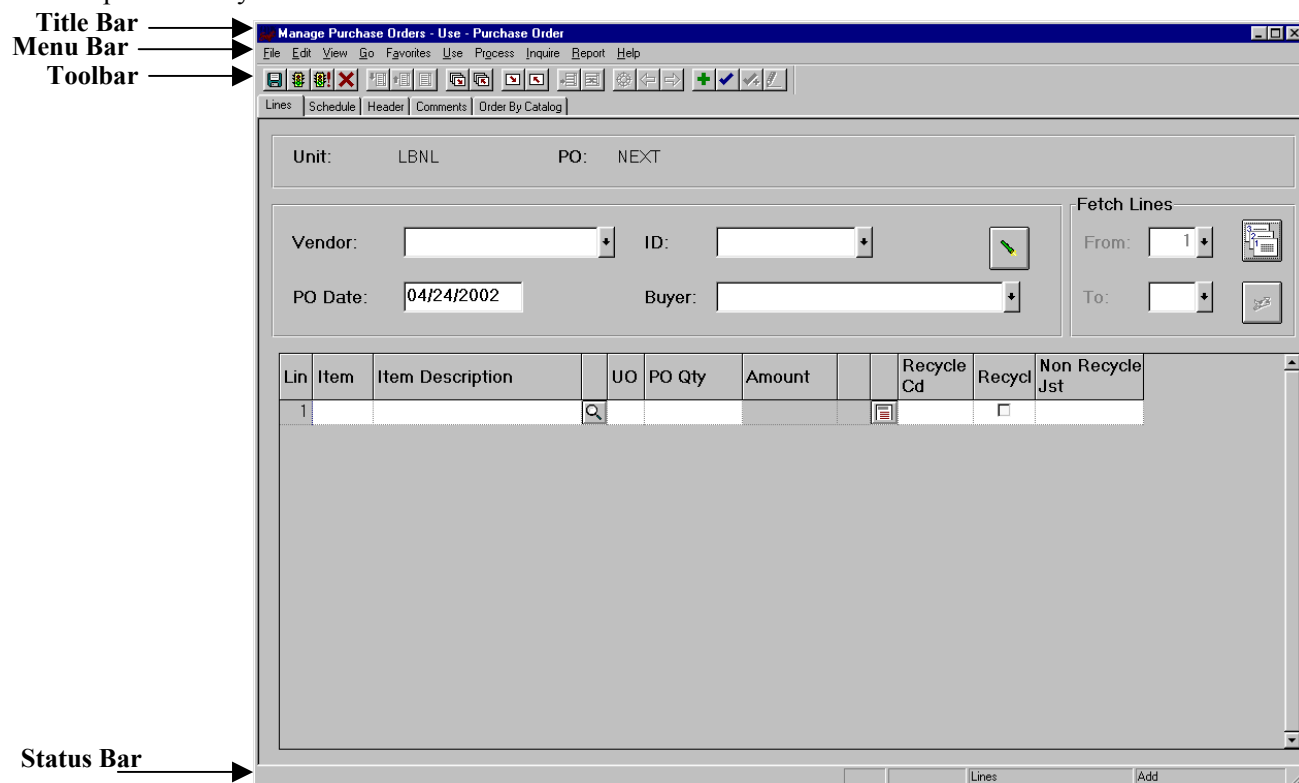
Click **OK**.

How do I work in PeopleSoft?



Step 2: Window Elements

The elements of each PeopleSoft window provide window information and navigational tools that you use to operate the system.



Window buttons

- Minimizes the active window on to the taskbar.
- Restores the active window to the previous size
- Closes the active window

Title Bar

This bar shows the name of the open window, along with the navigation for the panel currently displayed.

Menu Bar

This bar displays various menu items that provide access to panels. It also provides navigational and data entry commands.

Status Bar














This area at the bottom of the window displays the name of the Database Environment, current panel, and the action you are performing.

How do I work in PeopleSoft?

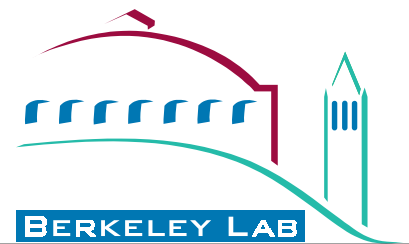
Toolbar





Toolbar buttons help you navigate the system and enter data. They also provide quick alternatives to menu commands. Most menu bar choices have a corresponding toolbar button.



MENU ITEM	KEYSTROKE	TOOLBAR BUTTON	DESCRIPTION
Save	Enter		Saves records and stores panel changes
Run	No Keystroke		Runs a process that allows you to specify run options
Run with Defaults	No Keystroke		Runs a process using the defaults set in the scheduler
Cancel	Esc		Clears the panel and any data you may have entered or changed without saving
Next in List	F9		Displays the panel for the next data row in your search list box
Previous in List	Shift + F9		Displays the panel for the previous data row in your search list box
List	Ctrl + F9		Displays the List box generated by the search record for this panel and allows you to select another data row to update.
Next Panel in Group	F2		Advances you to the next panel in a series of grouped panels
Previous Panel in Group	Shift + F2		Moves you back one panel in the group
Next Panel (in list)	F6		Advances you to the next panel listed on the menu
Previous Panel (in list)	Shift + F6		Moves you back one panel to the preceding panel listed on the menu
Insert Row	F7		Inserts a new row into the current record
Delete Row	F8		Deletes the current row

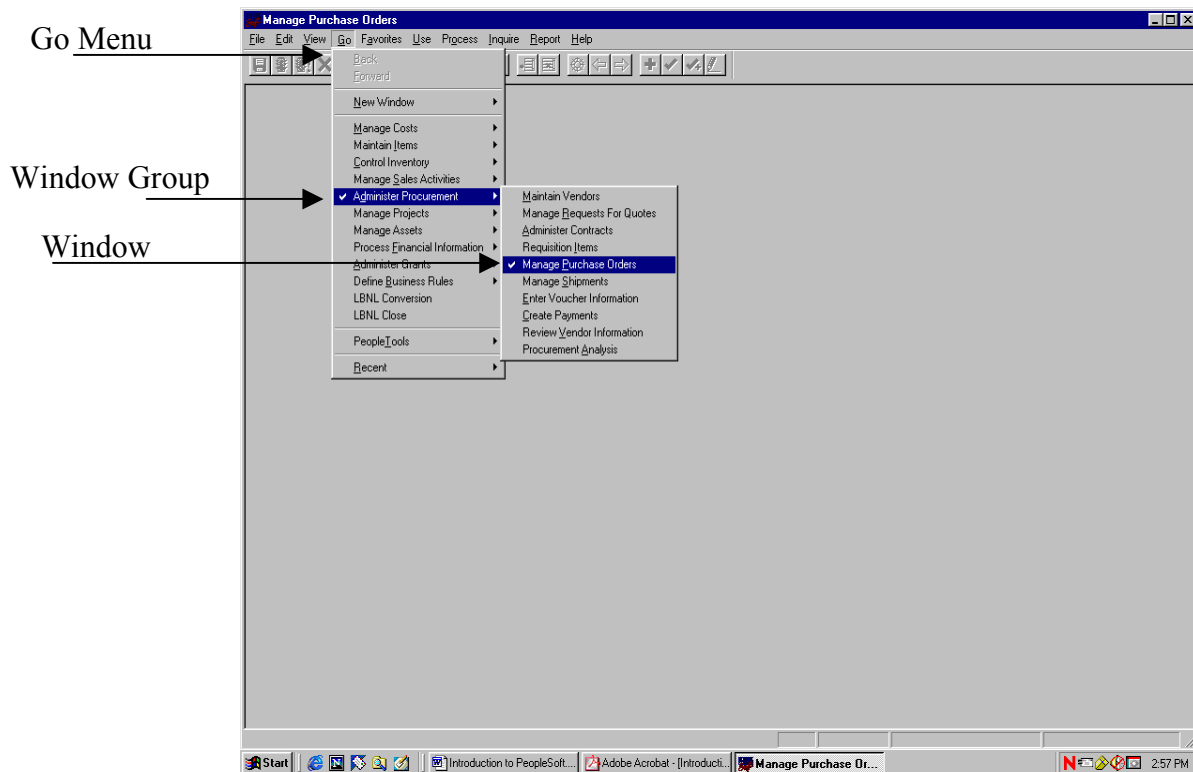
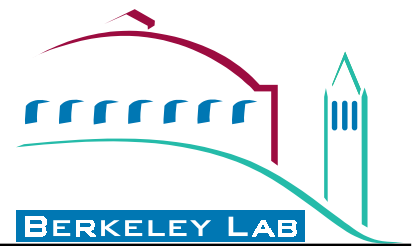
How do I work in PeopleSoft?



MENU ITEM	KEYSTROKE	TOOLBAR BUTTON	DESCRIPTION
Add	No Keystroke		Inserts a new record
Update	No Keystroke		Updates and displays current and future records
Update/ Display All	No Keystroke		Updates and displays all records.
Correction	No Keystroke		Corrects historical or current records

ToolTips are a helpful way of remembering what each button does. If you hold your mouse over a button for several seconds, the button name will appear under your cursor.

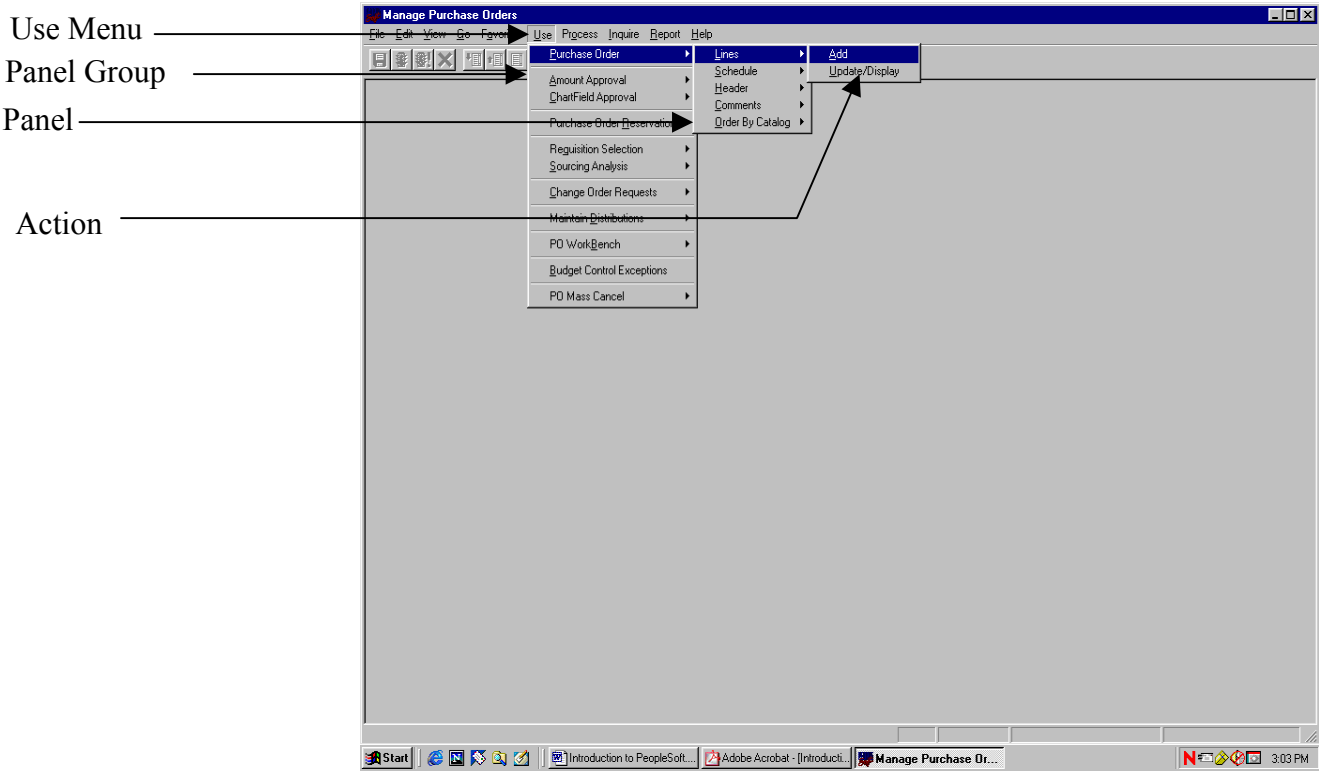
How do I work in PeopleSoft?



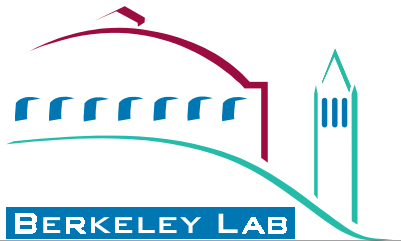
After you select a window, you select a panel. PeopleSoft uses the term "panel" to describe a screen and gives each panel a name. PeopleSoft organizes multiple panels with related data into panel groups.

How do I work in PeopleSoft?

The figure below illustrates how you access a panel.



How do I work in PeopleSoft?



Step 3: Adding & Update Display

When you select "Add" to add a new record, an Add dialog box displays.

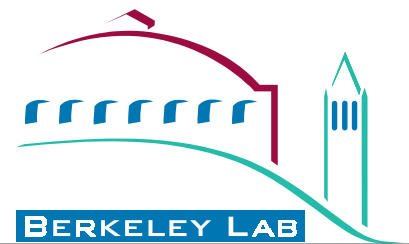
A screenshot of the "Add -- Purchase Order" dialog box. It has a blue title bar with a close button. The main area contains two labels: "Business Unit:" with a dropdown menu showing "LBNL" and a small arrow icon, and "Purchase Order:" with a text box containing "NEXT". To the right of these fields are two buttons: "OK" and "Cancel".

When you select "Update/Display" either to view or change an existing record, an Update/Display dialog box displays.

A screenshot of the "Update/Display -- Purchase Order" dialog box. It has a blue title bar with a close button. The main area contains several fields: "Business Unit:" with a dropdown menu showing "LBNL", "Purchase Order:" with a text box, "Purchase Order Date:" with a date picker, "PO Status:" with a dropdown menu, "Short Vendor Name:" with a dropdown menu, "Vendor ID:" with a dropdown menu, "Name 1:" with a text box, "Buyer Name:" with a dropdown menu, and "Purchase Order Reference:" with a text box. To the right of these fields are five buttons: "OK", "Cancel", "Search", "Detail", and "New Query". Below the fields is a table with the following columns: Unit, PO, PO Date, Status, ShortName, Vendor, and Name. The table is currently empty.

You use the fields in the dialog box to help narrow the search for the record you need.

How do I work in PeopleSoft?



Panel Elements

Panels are made up of elements that have various functions. The panel below illustrates several of the most common elements.

The screenshot shows the 'Maintain Vendors - Use - Vendor Information' panel. Annotations point to the following elements:

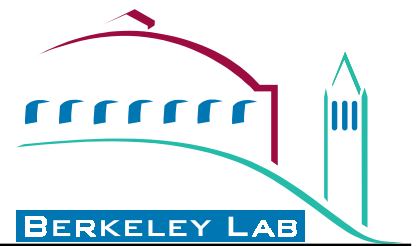
- Display-Only Field:** Points to the 'SetID' field containing 'LBNL'.
- Button:** Points to a button with an information icon (i) in the top toolbar.
- Drop-down list box:** Points to the 'Classification' field showing 'Supplier'.
- Check Box:** Points to the 'Open For Ordering' checkbox, which is checked.

Other visible fields include 'Vendor' (0000000024), 'Name 1' (Boise Cascade), 'Name 2' (empty), 'ShortName' (BOISE), 'BOISE-001', 'Status' (Approved), 'Persistence' (Regular), and 'Corporate Vendor' (unchecked).

The table below provides examples and descriptions of the most common elements on a panel.

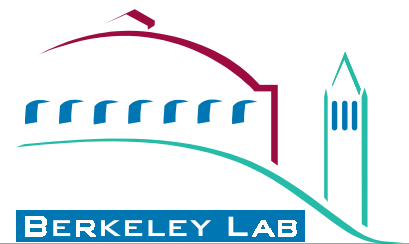
PANEL ELEMENT	DESCRIPTION
Drop-down list box	Field linked to table of associated selections. To select, click the drop-down arrow, and then double click the valid value or, position your cursor in the field, press F4 , and then double-click your selection.
Free-form field	Data entry field typically used for informal record keeping.
Display-only field	Field in which data can be viewed but not changed

How do I work in PeopleSoft?



PANEL ELEMENT	DESCRIPTION
Derived field	Field that is system-populated based on results of a calculation or information from a related data field
Default field	Field that is system-populated with a predefined value
Check box	A yes or no indicator related to the field label To select or deselect a check box, click inside the box
Radio button	Select a valid value for a field. To activate an option, click the appropriate Radio button. The remaining buttons, in certain cases, will dim.
Frame	A box around a group of related fields on a panel. Frames provide organizations to panels by enclosing related options.
Group Box	A box, similar to a frame, around a group of related fields. Group boxes have labels describing the contents of the box. Group boxes often identify a series of Radio button.
Scroll Bars	A function that allows you to access multiple rows of data for a panel item. For instance, if an item has multiple lines that cannot all fit on the panel, the scroll bar enables you to scroll through the lines in numerical order.
Buttons	You use various buttons on panels to navigate to or display a related panel or dialog box. These buttons display a ToolTip when you place your mouse pointer over them.

How do I work in PeopleSoft?



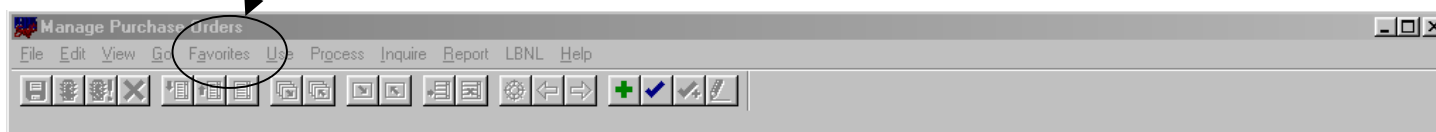
Step 4: Favorites

Favorite Menu Bookmarks

If there are panels that you use frequently, you can use the Favorites menu to access those panels more quickly. When you add a panel to the Favorites menu, the system creates a "bookmark". You can then display the panel simply by clicking the Favorites menu and then selecting the panel from the menu.

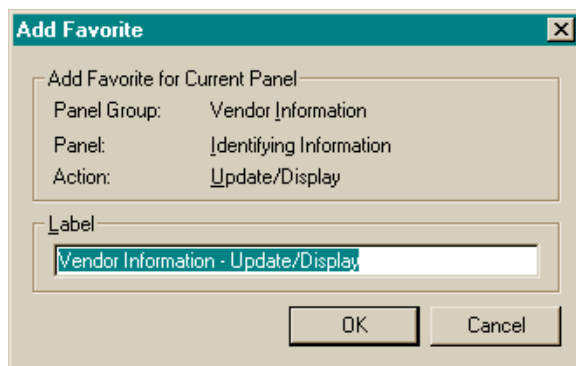
To Add a Panel to Your Favorites Menu

⇒ Favorites



⇒ Add to Favorite

The Add to Favorites dialog box displays.



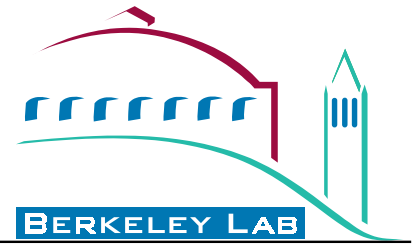
In the **Add Favorites** dialog box, you can either:

- Click **OK** to accept the default bookmark name.
- In the **Label** field, type a brief description, then click **OK**.

The system adds the panel to your Favorites menu.

NOTE: Bookmarks are created for a specific operator ID. When you create a bookmark for a panel, the bookmark displays only on your Favorites menu. It does not display on the Favorites menu for another operator ID, unless that user also created a bookmark for that panel.

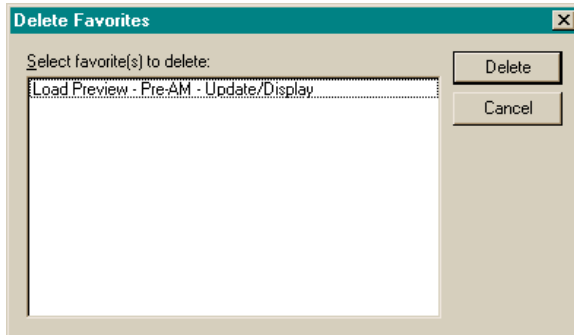
How do I work in PeopleSoft?



To Delete a Panel from Your Favorites Menu

- ⇒ Favorites
- ⇒ Delete Favorites

The Delete Favorites dialog box displays.



From the list of bookmarks, select bookmarks to delete, then click **Delete**.

NOTE: Favorites are created and deleted for a specific operator ID. When you delete a bookmark, the system deletes the bookmark only from your Favorite's menu. It does not effect the Favorites menus of other users.

Effective Dates

Effective Dates are an important concept in PeopleSoft. Effective-dated data is associated with a date. This date determines when information goes into affect. Effective-dated data tracks information historically over time and allows you to track events that occur over the life of the data.

How do I work in PeopleSoft?

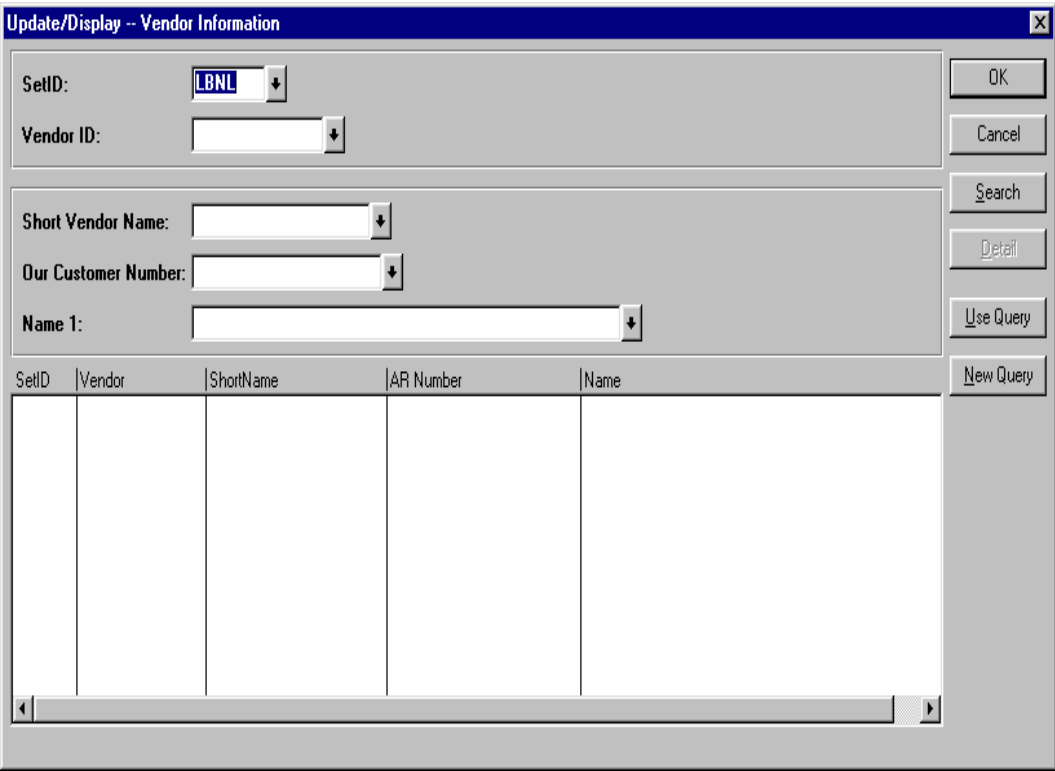
Step 5: Performing Searches

It may be necessary for you to search for information within PeopleSoft.

When conducting a search, a dialog box prompts you to specify the record you want to view. In this dialog box, you enter specific information so the system can search for and retrieve the appropriate record from the database.

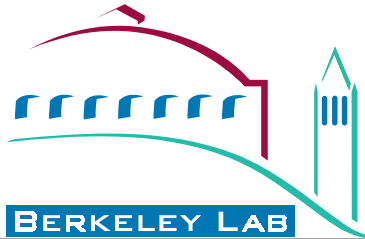
Specifying Search Criteria

The information you enter in the fields on the dialog box determines the information the system retrieves from the PeopleSoft database. Therefore, the key to retrieving the appropriate data lies in properly entering data in the necessary fields on the dialog box.



SetID	Vendor	ShortName	AR Number	Name
-------	--------	-----------	-----------	------

How do I work in PeopleSoft?



Searching for Values

Within the many PeopleSoft panels, it may be necessary for you to search for a field value when performing a business function, such as an item ID. You can search for information using the **Search** button.

When you click the search button, PeopleSoft will retrieve the first 250 records that match your criteria. If you do not list any criteria, the first 250 available records will display.

The dialog box titled "Valid Values" contains the following fields and buttons:

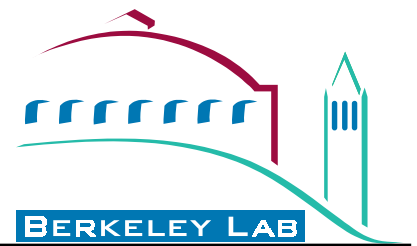
- SetID: LBNL
- Vendor ID: [dropdown arrow]
- Short Vendor Name: [dropdown arrow]
- Our Customer Number: [dropdown arrow]
- Name 1: [dropdown arrow]
- Buttons: OK, Cancel, Search

The results table is as follows:

SetID	Vendor	ShortName	AR Number	Name
LBNL	0000000024	BOISE-001		Boise Cascade
LBNL	0000000025	GODZILLA-001		Godzilla Demolition
LBNL	0000000026	PEOPLESOFT-001	123456789110111	PEOPLESOFT, INC.
LBNL	0000000027	UCREG-001		UC Regents

You can, however, use the dialog box to search for records that are more specific. PeopleSoft supports wildcard searches. After you enter criteria to narrow the search, click Search, and the system displays values meeting the criteria you specified.

How do I work in PeopleSoft?



Specifying Partial Search Criteria

You may not know all of the information to enter in the Update/Display - dialog box. You can enter either a full or partial value for the search. When you enter a partial value, and then click the Search button, the list box at the bottom of the Update/Display Dialog box will appear.

Update/Display -- Vendor Information

SetID: LBNL

Vendor ID:

Short Vendor Name: B

Our Customer Number:

Name 1:

OK

Cancel

Search

Detail

Use Query

New Query

SetID	Vendor	ShortName	AR Number	Name
LBNL	0000000024	BOISE-001		Boise Cascade

From the list box, you can select the record you want to display by either:

- Clicking the record to highlight it, then clicking **OK**.
- Double-clicking the record.